

CON PLAN QUICK GUIDE



Creating a Consolidated Plan For State and Entitlement Grantees

February 2020





WHAT ARE CON PLAN QUICK GUIDES?

The Con Plan Quick Guides provide a brief summary of the steps required to set up and complete certain elements of the Consolidated Plan, Annual Action Plan, and CAPER. For complete guidance and screen-by-screen instruction, review the [Con Plan in IDIS Desk Guide](#).

CREATING A CONSOLIDATED PLAN

For State and Entitlement Grantees

These instructions are for state and entitlement grantees. Consortia grantees and regional grantees should use the consortia and regional grantee quick guides.

When creating a new Consolidated Plan, grantees have two options: 1) copying a previous plan or 2) adding a new, blank template.

1. Copying a previous Consolidated Plan entered into IDIS: Copying a plan retains all information and narrative from the previous Consolidated Plan, but updates the data to the most current data in the eCon Planning Suite. Grantees will need to manually update all narratives to reflect current conditions.

When copying a plan, grantees are unable to change the CPD programs and the Public Housing Agencies included in the Consolidated Plan. **Do not use the Copy option if adding a new CPD funding source or a new PHA for the new Consolidated Plan cycle.**

The copy functions for Annual Action Plans have been modified in IDIS Release 11.19 (December 2019). Through the new amendment functionality, grantees will have one and only one “official” plan for each program year. Grantees should now only use the copy functions to create new plans for new program years.

2. Adding a new Consolidated Plan: Adding a new plan produces a completely blank template with the most current data in the eCon Planning Suite. Grantees will need to complete all narrative fields and tables.

When adding a plan, grantees are able to change the CPD programs and the Public Housing Agencies included in the Consolidated Plan. **New entitlement grantees should follow the steps for Option 2.**

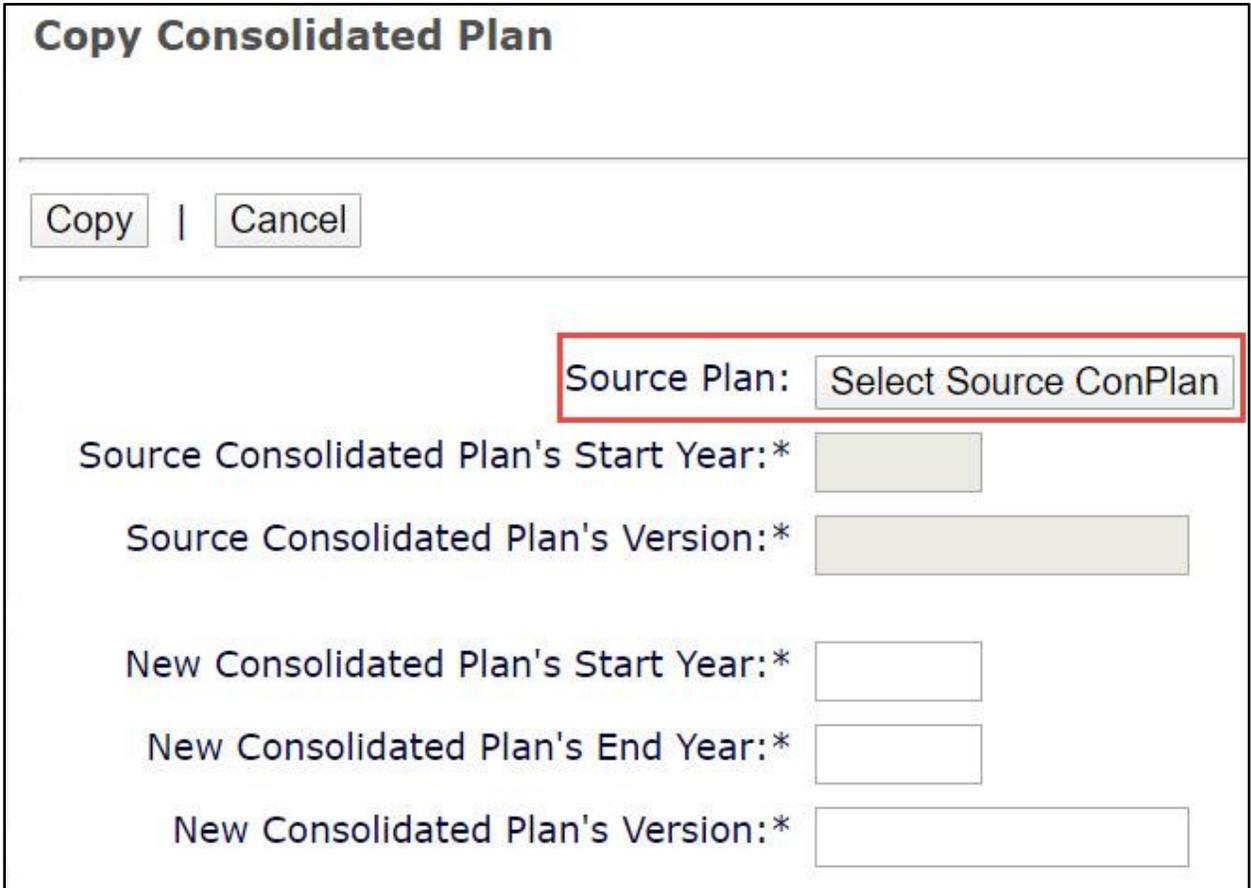
CREATING A CONSOLIDATED PLAN FOR STATE AND ENTITLEMENT GRANTEES

I. CREATING A PLAN BY COPYING A PREVIOUS CONSOLIDATED PLAN

1. Click "Copy" under the "Consolidated Plans" submenu.



2. Click the "Select Source ConPlan" button.



A screenshot of a dialog box titled "Copy Consolidated Plan". At the top left, there are two buttons: "Copy" and "Cancel", separated by a vertical line. Below the buttons, there is a section for selecting a source plan. The label "Source Plan:" is followed by a button labeled "Select Source ConPlan", which is highlighted with a red rectangular box. Below this, there are several input fields with asterisks indicating they are required:

- Source Consolidated Plan's Start Year: * [input field]
- Source Consolidated Plan's Version: * [input field]
- New Consolidated Plan's Start Year: * [input field]
- New Consolidated Plan's End Year: * [input field]
- New Consolidated Plan's Version: * [input field]

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- The system will display a search screen. Click the “Search” button to locate and select the source plan to be copied, and then click the “Select” button. Only one Consolidated Plan for each Strategic Plan timeframe will be available. A plan will be displayed for selection only if a) it has a status of “Review Completed,” and b) it is the most current plan for a particular start year. If the target year entered already has a plan that has been submitted, reviewed, and/or amended, the new copy cannot be edited or submitted to HUD.

Select Source ConPlan

Search

Select | Cancel

Search Criteria

Year: All Years ▾ Status: Select ▾

Search | Reset

Results Page 1 of 1

Select	Grantee Name	State	Year	Version	Title	Status
<input checked="" type="radio"/>	SAN ANTONIO	TX	2015	1	San Antonio Five Year Consolidated Plan 2015-2019	Review Completed

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4. Enter the New Consolidated Plan’s Start Year, End Year, and Version. Click the “Copy” button.

Source Plan:

Source Consolidated Plan's Start Year:*

Source Consolidated Plan's Version:*

New Consolidated Plan's Start Year:*

New Consolidated Plan's End Year:*

New Consolidated Plan's Version:*

Housing Trust Fund Subgrantee:

|

5. The new plan has been created and will appear on the Search ConPlan screen. The default title of the plan will include [COPY] at the beginning of the original title. Grantees should update the title on the AD-25 Administration screen.

Grantee Name	State	Year	Version	Title	Status	Action
SAN ANTONIO	TX	2020	1	[COPY] San Antonio Five Year Consolidated Plan 2015-2019	Open - in Progress	Edit View
SAN ANTONIO	TX	2015	1	San Antonio Five Year Consolidated Plan 2015-2019	Review Completed	Amend View

II. CREATING A NEW PLAN BY ADDING A NEW CONSOLIDATED PLAN

1. Click “Add” under the “Consolidated Plans” submenu.



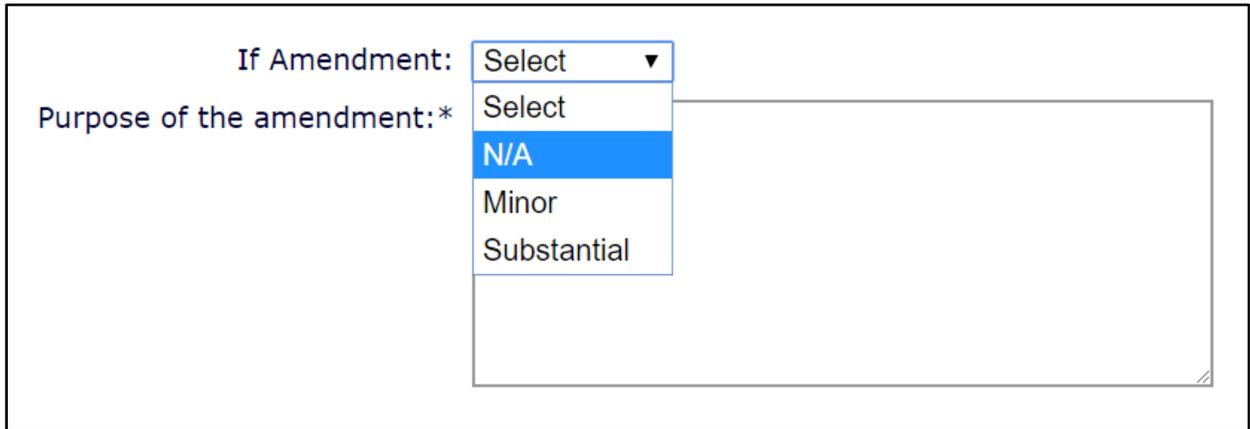
2. Enter the Strategic Plan beginning year and ending year. Enter the first program year of the Consolidated Plan. This is the federal fiscal year in which the plan begins. Enter the last program year of the Consolidated Plan. This is the federal fiscal year in which the last program year begins.

A screenshot of a form with four input fields. The first field is labeled "Strategic Plan Beginning Year: *" and has a small rectangular input box. The second field is labeled "Ending Year: *" and has a small rectangular input box. The third field is labeled "Title: *" and has a long horizontal rectangular input box. The fourth field is labeled "Plan Version: *" and has a small rectangular input box.

3. Enter a title. HUD has not provided any guidance for the title. The title will be displayed on the on the cover and at the top of each page of the printed report. The title can be changed after the plan is created.
4. Enter the plan version. This field identifies different versions of a plan for the same beginning year. The version cannot be edited after the plan has been created.

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- For “If Amendment,” select N/A. The default is set to “Select” and if this is not changed to “N/A,” the system will generate an error message that will prevent grantees from saving the screen and creating the new plan. Minor or substantial amendments should not be selected on this screen.



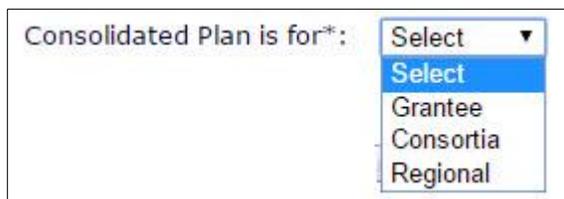
The screenshot shows a form field labeled "If Amendment:" with a dropdown menu. The dropdown menu is open, showing the following options: "Select", "Select", "N/A", "Minor", and "Substantial". The "N/A" option is highlighted in blue. Below the dropdown menu is a large empty rectangular box.

- Ensure the programs included are correct. Grantees can change the default selection if it is incorrect. At least one selection must be indicated.



The screenshot shows a form field labeled "Programs included: *" with a list of checkboxes. The checkboxes are: CDBG, HOME, ESG, and HOPWA.

- Select the type of plan. State and entitlement grantees will choose “Grantee.”



The screenshot shows a form field labeled "Consolidated Plan is for: *" with a dropdown menu. The dropdown menu is open, showing the following options: "Select", "Select", "Grantee", "Consortia", and "Regional". The "Select" option is highlighted in blue.

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8. Click the “Select Public Housing Agency” button.

Select Public Housing Agency

The system will display a search screen. Search for the public housing agencies operating within the jurisdiction by agency name, code, or by clicking “Search” to see all the public housing agencies in the state. In the results, click the checkbox next to each public housing agency that operates within the jurisdiction and click the “Select” button.

- Grantees must select at least one PHA in order to create the Consolidated Plan.
- States must select any PHA that administers public housing or Section 8 on a statewide basis and all PHAs that certify consistency with the state Consolidated Plan.

AD-15 Select Public Housing Agency

Select | Cancel

Search Criteria

Agency Name Code:

Search | Reset

Name of Public Housing Agencies

Results Page of

Organization Name	Code	City, State/Territory
<input type="checkbox"/> 1260 Housing Development Corporation	PA889	PA
<input type="checkbox"/> ALLEGHENY COUNTY HOUSING AUTHORITY	PA006	PA
<input type="checkbox"/> ALTOONA HOUSING AUTHORITY	PA031	PA
<input type="checkbox"/> Adams County Housing Authority	PA091	PA
<input type="checkbox"/> Allentown Housing Authority	PA004	PA

9. When finished, click the “Save” button at the bottom of the screen to create the Consolidated Plan template. Locate the new Consolidated Plan by clicking “Search” under the “Consolidated Plans” submenu.